Professional Development Planning

using

PDTRACK

"Facilitator" and "PD Provider Rep" Training Guide

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KENTUCKY ADULT EDUCATION LEARNING FOR LIFE

KYVAE KY VIRTUAL ADULT EDUCATION

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Training server: https://testPDtrack.kyvae.org

Production server: https://PDtrack.kyvae.org

Chapter 1 – Submitting an item

Objectives

- Submit an item for review by KYAE.
- Bundle other items with a new item.

Activities

You will use the **training server** (https://testPDtrack.kyvae.org/) for the activities in this chapter. You have been assigned a PDtrack training session **user name** and **password** (this should be highlighted on page 12). **This account will be used for the entire training.**

1. First, you will submit a "stand-alone" item. Click **Submit Item** at the top of the page to get started.
   - There are only two mandatory fields: **Title** and **Description/Overview**. Although the remaining fields and selections are optional, it is **highly** recommended to fill in as many details as possible. As you do so, bear in mind how registrants will **filter** (by provider, location, or specialty track), **sort** (by title, provider, or date), and **search** (by title, description, provider, location, or specialty track) the catalog. Filling out more fields accurately with appropriate keywords will make your item more accessible to registrants, as well as making the item more likely to be approved by KYAE.
   - Let's take a look at the remaining fields:
     - **Item Start Date, Item End Date —** These fields define the start and end times and dates for your item. (The default values are midnight for the date you submit the item.)
     - **Name of Provider —** This field defines the organization responsible for the item (such as KYAE or KYVAE Educators). You can select from a list of predefined providers or set your own by selecting **<Other Provider>** and typing the name in the text box **Other**.
     - **Target Audience —** This area allows you to mark the areas for which this item is designed. (This does not prevent enrollment by someone who is not in the target audience.) Check all that apply.
     - **Geographic Region —** This field allows registrants to filter by region in order to find trainings closer to their locations.
     - **Location —** This is the specific location for the item. You can select from a list of predefined locations or set your own by selecting **<Other Location>** and typing the name in the text box **Other**.

- **Directions —** This field will allow you to enter directions to a location if you select **<Other Location>**. If you select a predefined location, the directions are pulled from a system table. (Not all predefined locations have directions defined at this point.)
- **Specialty Track —** This area defines which specialty track(s) the item satisfies. **Please DO NOT mark any of these boxes.** Specialty tracks are defined by KYAE, so if you mark any of these boxes, it is likely that what you mark will be removed (unless it is an item already approved for a specialty track).
- **Objectives & Outcomes —** This text field allows you to give an overview of the item. Keep in mind as you enter text in this field that it will be presented in paragraph form only ("hard returns" will not be visible).
- **Learning Activities —** This area allows you to indicate what types of activities will be used in the item. Check all that apply.
- **Prerequisite/Advance Work —** This area allows you to indicate what work or courses are required to attend this item. **The system does not enforce the requirements.** Enforcement must be done manually by the facilitator.
- **Minimum Enrollment Quota —** This field allows you to set a minimum enrollment level. **Be careful here!** The system will automatically cancel the item if the quota is not met.
- **Maximum Enrollment Quota —** This field allows you to set a maximum enrollment level. Once the maximum is reached, it will mark the item "Full" and allow registrants to join a wait list. **You must enter a number greater than zero. If you enter zero, the system will not allow enrollment.**
- **Seat Hours —** Please enter 0 (zero). Seat hours are no longer used as an indicator of PD credit. If you enter any other number, it will be changed.
- **Facilitator —** This field is where you indicate the person that will be facilitating the session (*ie*, the instructor/leader). Click on and search for the person.
- **Visibility —** This area allows you to control if and when the item is visible in the catalog, if the item is visible in the calendar, and when registrants may enroll for the item. **We recommend always allowing an item to be visible in both the catalog and the calendar for the entire program year.** This area also allows you to indicate whether this item will be delivered online via KYVAE. **Remember to set appropriate enrollment start and end dates.**
- **Competencies —** This area allows you to indicate which competencies the item meets. Keep in mind that there are three sets of competencies: **Adult Education Practitioner Standards**, **Kentucky Administrative Practitioner Standards**, and **Kentucky Standards for Workplace Instructors**. Please indicate all competencies under each set (if any).
- **Registration Information —** This text field allows you to include additional information about enrollment for the item (*eg*, clarifying that an

item is limited to a specific group: "This event is only for staff from the KYAE office.")

- **Initial Registration Status —** There are three options here: **Enrolled**, **Completed**, and **Pending Instructor Approval**. If you do not want to limit enrollment to specific registrants, you should select **Enrolled**. If you select **Pending Instructor Approval**, the Facilitator must approve or deny enrollment in the item. (This is recommended if you want to limit the item to a specific group.) **Completed** is useful only if you will be batch enrolling registrants after the item occurs (**we do not recommend this**).
- **Registration Fees —** These two fields allow you to define fees for registrants who are employed by a KYAE-funded program and for those who are not. Typically, the fee for registrants who are not employed by a KYAE-funded program is $1,000 (enter a one followed by three zeros in the field), while the fee for registrants who are employed by a KYAE-funded program is $0 (enter only a zero in the field).
- **Bundled Items —** We will discuss this on our next item submission.

▪ If you are satisfied with your item, click **Submit** to submit the item for review by KYAE. When you submit an item in the production server, you will receive a confirmation email from PDtrack. You will also receive an email from PDtrack once KYAE makes a decision on your item.

2. Now that you have submitted a "stand-alone" item, let's submit a "bundled" item. Click **Submit Item** at the top of the page to get started. The **Bundled Items** feature allows you to indicate other items in the system for which enrollment is either recommended or required for a registrant to enroll in this item. When a registrant enrolls in an item with bundled items, the system will enroll them automatically in any items that are bundled with it. Registrants must enroll in all bundled items marked **mandatory**. Registrants can remove any items that are not marked mandatory.
   - Fill out the item details in the same manner as before.
   - Click **Add Items** under **Bundled Items**.
   - Search for and select any items that you want to bundle with your item. Click **Add to Bundle** when you are finished.
   - Indicate any mandatory items, remove any items if necessary, and then click **Update Bundle**.
   - When you are satisfied with your item, click **Submit Item**.

NOTE: Do **NOT** logout. We will continue in the training server for Chapter 2.

Chapter 2 -Facilitator Console

Objectives

- Manage your items.
- Identify registrant statuses.
- Manage your rosters.
- View your wait lists.
- Run reports.

Activities

You will use the **training server** (https://testPDtrack.kyvae.org/) for the activities in this chapter. You have been assigned a PDtrack training session **user name** and **password** (this should be highlighted on page 12). **This account will be used for the entire training.**

Manage your items.

- In the **Facilitator Console**, click on **Manage Items**. This will allow you to access a listing of all approved items for which you are listed as facilitator. You can review and manage item details by clicking on the title of each item in the list. **If you modify items in any way, the item must be reviewed by KYAE and the modifications approved or rejected.**

Identify registrant statuses.

- **Enrolled —** The registrant is enrolled to attend the event.
- **Completed —** The registrant attended the entire event and receives the associated PDUs.
- **Denied —** The registrant requested enrollment in an item that required facilitator approval for enrollment and the facilitator denied the request. **This status is also used to remove duplicate enrollments** (see **Update Status** below).
- **Incomplete —** The registrant did not attend the entire event and does not receive any PDUs.
- **No Show —** The registrant failed to show for the event and did not cancel their enrollment.
- **Pending Instructor Approval —**The registrant requested enrollment in an item that requires facilitator approval for enrollment. The facilitator must change their status to **Enrolled** or **Denied**.
- **Cancelled by Enrollee —** The registrant cancelled their enrollment in the event.
- **Cancelled by Provider —** The scheduled event was cancelled by the facilitator.

Manage your rosters.

- In the **Facilitator Console**, click on **Manage Rosters**. This will allow you to access the rosters for all approved items for which you are listed as facilitator. You can review and manage rosters by clicking  at the end of each item's row in the list.
  - **Register User… —** You can enroll registrants by clicking on  to search. When you find the desired registrant, click on their user name, then click on **Register** when you return to the main window.
  - **Filter by Status —** You can filter the roster to view only those registrants with a specific status (chosen from the drop-down box). Choose a status and click **Apply Filter**.
  - **Update Status —** To change the status of registrants, click on the checkbox at the end of the row (or click **Check All** if appropriate). From the **New Status** drop-down box, select their new status. You can suppress the automatic email from PDtrack by clicking the **Suppress Email?** checkbox (we recommend suppressing the email only when changing duplicate enrollments to "Denied"). To update the status of the selected registrants, click **Change Status**.
  - **Pending Registrations —** In the **Facilitator Console**, you should see **Pending Registrations**. This will tell you if you have any registrants who enrolled in items that were set to have the initial status as "Pending Instructor Approval." If you click on the underlined number next to **Pending Registrations**, you will be taken to the **Manage Rosters** page. You will change the status of registrants pending approval to either "Enrolled" or "Denied." **Do not suppress the email in this situation!** The automatic email will let the registrant know whether they were approved to attend.

View your wait lists.

- In the **Facilitator Console**, click on **View Wait Lists**. This will allow you to access a list of items for which a wait list exists. You can review wait lists by clicking on the item name. The wait list will give you a list of registrant names. Should spaces open in a full item, you can enroll registrants from the wait list from the **Manage Rosters** page: you must manually search for them by name and then click **Register**.

Run reports.

- From the top navigation bar, click on **Reports**. This will take you to the list of reports available to you. The two reports you will use the most as a facilitator are the **Sign-in Sheet** and **Completion Certificate**.

  - **Sign-in Sheet**

1. Click on **"Sign-in Sheet" Report**.
2. Complete a **Search** using the item name, code, or dates.
3. Click to add a checkmark in the **Select** box for the desired registrants.
4. Click **Generate Sign-in Sheets**.
5. Click **View Existing Sign-in Sheets**. A window will open with a list of all **Sign-in Sheets** generated.

6. Click on the **X** in the **Download** column to download a PDF of the **Sign-in Sheet** in a new window. (This requires Adobe Reader.)

- **Completion Certificate**

1. Click on **"Completion Certificate" Report**.
2. Complete a **Search** using the item name, code, or dates.
3. Click to add a checkmark in the **Select** box for the desired registrants.
4. Click **Generate Certificates**.
5. Click **View Existing Completion Certificates**. A window will open with a list of all **Completion Certificates**.
6. Click on the **X** in the **Download** column to download a PDF of the **Completion Certificate** in a new window. (This requires Adobe Reader.)

Appendix: PDtrack user role information

As a PDtrack user, you will likely identify with one or more of the following user roles:

- **Registrant** — Registrants can engage in PD activity: browse the catalog for items, build and submit PD plans, and run audits. **Known Registrants** have an active AERIN account and can enroll in catalog items at preferred pricing (generally no fee), and can propose annual PD plans. **Unknown Registrants** do not have an active AERIN account and can enroll in items by paying a standard fee.
- **Supervisor** — Supervisors can access all Known Registrant functions and approve Known Registrant PD plans at their location code. They can also manage Known Registrants' statuses for self-directed activities.
- **PD Provider Rep** — PD Provider Reps are authorized by a provider to submit items for inclusion in the catalog (subject to the required approvals). The item may be local or statewide in accordance with the provider. PD Provider Reps can also manage items' statuses (open for registration, full, cancelled, closed).
- **Facilitator** — Facilitators are the people who deliver items. They can access Registrant functions and manage rosters for items (updating the status of registrants).
- **Administrator** — Administrators are assigned specific administrative roles to manage all facets of the system. The roles are predefined using a configurable set of system access privileges, and can be changed by appropriate administrators at any time. Specific management functions include:
    - Review and approval of new items for inclusion in the catalog
    - Item creation and maintenance
    - System configuration

Appendix: Glossary of key terms

Term	Definition
AERIN	The database of record for KYAE provider employees, it is used to create and manage user account information for known users in PDtrack. AERIN is also used to enable progress tracking of these users toward their professional development goals.
Calendar	A date-based graphical display of catalog items that have been configured to appear on the calendar.
Cart	A temporary user-selected bundle of catalog items being considered for approval submission and/or enrollment and purchase.
Catalog	Central repository of all learning and professional development opportunities. Each unique learning opportunity is referred to as a catalog item. Item types include: off-line event; online event; online course; self-directed activity (reading, writing, etc.).
eRMA	A system that enables the delivery of online catalog items to Registrants through real-time integrations with several courseware management systems available via KYVAE (http://www.kyvae.org/).
Event	Any catalog item that is delivered at a specified time. These types of catalog items may be displayed in a graphical calendar view.
Item	A specific learning opportunity within the catalog.
PD	Professional Development
PDU	Professional Development Unit
Provider	The organization managing the offering of a catalog item.
SDA	Self-Directed Activity

Appendix: Goal setting

What makes a good goal?

Goal-setting wisdom has taught us a good goal must be written down and **SMART**:

- **S**pecific
- **M**easurable
- **A**ttainable
- **R**esults-oriented
- **T**ime-bound

Example of a SMART Goal:

"As a result of using small group instruction, the percentage of learners in my class will persist long enough to improve their reading scores by two levels this year."

- **Specific —** an increase in the number of learners who will continue coming to class long enough so they will improve their reading skills by two levels;
- **Measurable —** improve reading skills by two levels;
- **Attainable —** presumably possible to achieve;
- **Results-oriented —** specific results are stated;
- **Time-bound —** by this year's separation date of June 30.

Is this a SMART goal?

Think about what this writer is accomplishing and what is left out with the following statement:

"I want to take TABE training."

Why is this not a SMART goal?

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Appendix: Training accounts

Use these accounts in order to access the of PDtrack training server.

NOTE: All user names are case-sensitive and use **train** as the password.

Registrant user names	Supervisor user names	PD Advisor user names
TTRegistrant21	TTSupervisor1	TTPDA1
TTRegistrant20	TTSupervisor1	TTPDA1
TTRegistrant19	TTSupervisor2	TTPDA2
TTRegistrant18	TTSupervisor2	TTPDA2
TTRegistrant17	TTSupervisor3	TTPDA3
TTRegistrant16	TTSupervisor3	TTPDA3
TTRegistrant15	TTSupervisor4	TTPDA4
TTRegistrant14	TTSupervisor4	TTPDA4
TTRegistrant13	TTSupervisor5	TTPDA5
TTRegistrant12	TTSupervisor5	TTPDA5
TTRegistrant11	TTSupervisor6	TTPDA6
TTRegistrant10	TTSupervisor6	TTPDA6
TTRegistrant9	TTSupervisor7	TTPDA7
TTRegistrant8	TTSupervisor7	TTPDA7
TTRegistrant7	TTSupervisor8	TTPDA8
TTRegistrant6	TTSupervisor8	TTPDA8
TTRegistrant5	TTSupervisor9	TTPDA9
TTRegistrant4	TTSupervisor9	TTPDA9
TTRegistrant3	TTSupervisor10	TTPDA10
TTRegistrant2	TTSupervisor10	TTPDA10
TTRegistrant1	TTSupervisor11	TTPDA11
TTRegistrant22	TTSupervisor11	TTPDA11
TTRegistrant23	TTSupervisor12	TTPDA12
TTRegistrant24	TTSupervisor12	TTPDA12
TTRegistrant25	TTSupervisor13	TTPDA13
TTRegistrant26	TTSupervisor13	TTPDA13
TTRegistrant27	TTSupervisor14	TTPDA14
TTRegistrant28	TTSupervisor14	TTPDA14
TTRegistrant29	TTSupervisor15	TTPDA15
TTRegistrant30	TTSupervisor15	TTPDA15